



Fig. 1 – Illustrator Main Screen



**DIAMONDLIGHT**  
FINANCIAL SERVICES, LLC

# Plan Illustrator

## 2004



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**Open Existing Illustration:** Sample Company

**Plan Assumptions**

Effective Date: **January 1, 2004**

Eligibility/Vesting: 6 Months / Graded Vesting

Normal Retirement Age: 62 %

Benefit (% of Salary): 100 % (Range: 20-100)

[Save/Update Illustration](#)

[Preview/Print Illustration](#)

[Begin New Illustration](#)

[Delete Current Illustration](#)

[Plan Verification Interview](#)

[Print Worksheet](#)

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**Company Information**

Company Name: Sample Company

Address 1: 1000 Main Street

Address 2: Suite 500

City, ST, ZIP: Tampa FL 34567

Phone: 813 555 1212 FAX: 813 555 1313

Plan Trustee: Mr. John Smith

**Plan Participants**    **F2 - Delete Selected Participant**

	First Name	Last Name	Age or DOB	DOH	Owner	Salary	Contribution	Monthly Benefit	Lump Sum
1	John	Smith	8/14/48	1/1/1996	<input checked="" type="checkbox"/>	\$205000	\$159,709	\$9,625	\$1,340,569
2	Tina	Matheson	11/2/51	1/1/1996	<input checked="" type="checkbox"/>	\$155000	\$136,489	\$12,917	\$1,799,032
3	William	McArdle	3/18/53	1/1/1996	<input checked="" type="checkbox"/>	\$110000	\$85,277	\$9,167	\$1,276,732
4	Shiela	Moretti	7/4/54	5/11/2003	<input type="checkbox"/>	\$65000	\$17,386	\$5,417	\$754,433
5	Frank	Peterson	9/2/71	2/1/2002	<input type="checkbox"/>	\$44000	\$6,460	\$3,667	\$510,693
6									

**Total Contribution:    \$405,320**

Fig. 2 – Illustrator Illustration First Page

**Mike Johnson, CPA**

555 Bean Counter Way

Safety Harbor, FL 34695

Phone: (727)555-9876 FAX: (727)555-8765

## Defined Benefit Pension Plan Illustration of Plan Provisions

*Prepared For*

**Sample Company**

1000 Main Street Suite 500 Tampa, FL 34567

**Illustration Date:** August 04, 2004

**Effective Date:** January 1, 2003

**Plan Year:** January 1 to December 31 of each year

**Eligibility:** January 1 coincident with or next following the attainment of age 20.5 and 6 months of service with graded vesting

**Normal Retirement Age:** The greater of age 62 and 5 years of plan participation

**Normal Retirement Benefit:** 100% of average monthly compensation (maximum dollar limitation is prorated for less than 10 years of participation)

<u>Participant</u>	<u>Max DC</u>	<u>DB C Contribution</u>	<u>DB Monthly Benefit</u>	<u>DB Lump Sum</u>
Mattheson, Tina	\$41,750	\$136,489	\$12,917	\$1,799,032
McArdle, William	\$30,500	\$85,277	\$9,167	\$1,276,732
Non-Owner Participants	\$27,250	\$23,846	\$9,084	\$1,265,126
Smith, John	\$44,000	\$159,709	\$9,625	\$1,340,569
<b>Contribution Totals:</b>	<b>\$143,500</b>	<b>\$405,320</b>		

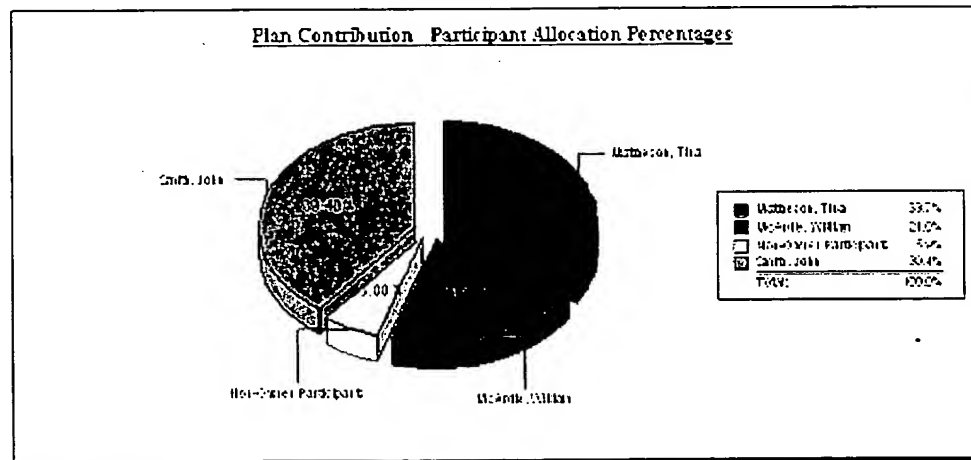




Fig. 3 – Illustrator Interview Screen


**Confirm Participant Data**


### Plan Interview - Sample Company

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**Company Name:** 
**Plan Trustee:**

**Legal Entity**

☒ **C-Corp**
☐ **S-Corp**
☐ **Partnership**
**Date Established:**  (mm/dd/yyyy)

☐ **LLC**
☐ **LLP**
☐ **Sole Proprietor**
**Federal EIN:**  (##-#####)

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**Industry Classification**

Major Classification:


Minor Classification:

For more information on NAICS codes, please visit: <http://www.census.gov/epcd/www/naics.html>

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	Participant	Date of Birth	Date of Hire	2002 W-2 Compensation
1	Smith, John	8/14/48	1/1/1996	\$205,000
2	Mattheson, Tina	11/2/51	1/1/1996	\$155,000
3	McArdle, William	3/18/53	1/1/1996	\$110,000
4	Moretti, Shiela	7/4/64	5/11/2003	\$65,000
5	Peterson, Frank	9/2/71	2/1/2002	\$44,000

Fig. 4 – Administrator Plan Selection Screen



**DIAMONDLIGHT**  
FINANCIAL SERVICES, LLC

**Plan Administrator v1.0**

File Tools Help

Refresh

Logout

	Company	Implemented	Current Plan Year	# of Participants	Plan Assets	Last Updated	Status
2	Physics Incorporated	03/15/2003	1/1/2003	25	\$676,551	03/28/2003	ACTIVE
5	Sample Company	07/10/2003	1/1/2003	1	\$0	07/10/2003	PENDING
7	ABC Corp	02/28/2003	1/1/2004	3	\$176,000	04/25/2003	ACTIVE
9	Test Company	02/17/2003	1/1/2006	2	\$200,000	04/18/2003	ACTIVE

Fig. 5 – Administrator Plan Detail Screen

Diamondlight Plan Administrator - Plan Details

File Tools

Plan Administration - Physics Incorporated

RefreshClose Plan

**Company Info**

**Company Name:** Physics Incorporated  
**Address 1:** 1111 Eleven Street  
**Address 2:** Suite 11  
**City, ST ZIP:** Pittsburgh, PA 15234  
**Phone:** (813) 555-1313  
**FAX:** (412) 461-7292  
**FEIN:** 28-7632873  
**Trustee:** Mr. Test Trustee  
**Date Established:** 1/1/1999  
**Legal Entity:** LLC

Edit Company Info

**Plan Summary**

**Current Plan Year:** 1/1/2003  
**Plan No:** 001  
**Plan Name:** Physics Incorporated Defined Benefit Plan  
  
**Normal Retirement Age:** 62  
**Salary Scale:** 0%  
**Eligibility/Vesting:** 6 Month/Graded  
**Benefit (% of Salary):** 100%  
**Valuation Rate:** 6%  
  
**Plan Effective Date:** 1/1/2003

**2003 Plan Financial Status**

**Assets As Of 1/1/2003:** \$0  
**Required Contribution:** \$676,551  
**Contributions YTD:** \$676,551  
  
**Remaining Contribution:** \$0  
**Contribution Met**

Contribution Ledger

**Plan Documents**

☐ Adoption Agreement  
☐ Summary Plan Description  
☐ Benefit Designation Form  
☐ Prototype Plan  
☐ Resolution Certificate

Generate Documentation

Double-click a Participant to open:

	Participant	Sex	Owner	Contribution	Retirement Date	Status
1	Bohr, Neils	M	<input checked="" type="checkbox"/>	\$124,039	4/1/2014	Active
2	Einstein, Albert	M	<input checked="" type="checkbox"/>	\$154,869	2/1/2010	Active
3	Hawking, Stephen	M	<input checked="" type="checkbox"/>	\$140,892	6/1/2013	Active
4	Adams, Samuel	M	<input type="checkbox"/>	\$3,654	8/1/2038	Active
5	Albertson, Alyssa	F	<input type="checkbox"/>	\$12,966	3/1/2026	Active
6	Boyd, Woody	M	<input type="checkbox"/>	\$4,658	7/1/2031	Active
7	Buddhism, Zen	M	<input type="checkbox"/>	\$15,322	9/1/2021	Active

2003 Contribution: \$676,551
Add a Participant

Fig. 6 – Administrator Participant Administration Screen

Diamondlight Plan Administrator - Participant Details							
File Tools							
<h2>Participant Administration: Bohr, Neils</h2>							
<a href="#">Refresh</a>		<a href="#">Close Participant</a>					
<b>Participant Information</b> <b>Participant Name:</b> Bohr, Neils <b>Sex:</b> M <b>Birth Date:</b> 3/12/1952 <b>Hire Date:</b> 1/1/1999 <b>Owner:</b> Yes <b>Eligible On:</b> 1/1/2003 <b>Status:</b> Active <b>Retirement Date:</b> 4/1/2014		<b>Benefit Calculation</b> <b>Past Vesting Service:</b> 4 <b>Percent Vested:</b> 80% <b>Total Benefit Service:</b> 11 <b>Future Service:</b> 11 <b>Accrued Benefit:</b> \$0 <b>Vested Accrued Benefit:</b> \$0 <b>Present Value VAB:</b> \$0 <div style="text-align: right; padding-top: 10px;"><a href="#">Benefit Statement</a></div>					
	Plan Year	Eligible	W2 Comp	Contribution	AB	VAB	▲

Fig. 7 – Administrator Contribution Ledger Screen

**Diamondlight Plan Administrator - Contribution Ledger**

**Contribution Ledger**  
**Physics Incorporated - 2003**

Double-click on an entry to delete that entry. Close Ledger

	Date	Description	Amount
1	2/15/2003	Plan Contribution	\$100,000
2	3/28/2003	Plan Contribution	\$100,000
3	3/28/2003	Plan Contribution	\$476,551

**Plan Year 2003 Contribution Total: \$676,551**

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Date	Description	Amount
8/4/2004	Plan Contribution	